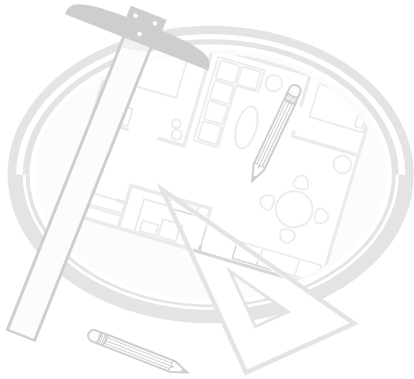




Architect

Architectural Services



U.S. PRESENCE

- ▶ The United States is Canada's largest foreign investor. Statistics Canada reports that in 2002, the United States invested approximately US\$7 billion in construction expenditures in Canada.
- ▶ Canadian architects regularly form alliances with small and medium sized U.S. firms to respond to operational challenges.
- ▶ To date, thirty-nine States and all ten Canadian provinces have agreed on a framework to grant reciprocal privileges in licensing their respective architects.

MARKET OVERVIEW

- ▶ Approximately 4,600 Canadian architectural firms generated operating revenues of US\$1.36 billion in 2002, a record increase of 18.5% from the previous year.
- ▶ According to the Royal Architectural Institute of Canada, there are approximately 35,000 people employed by this sub-sector, of which more than 7,000 are registered/licensed architects.
- ▶ The institutional market accounts for the largest share of architectural revenues - almost 40% nationally, followed by the commercial market and the residential market.
- ▶ The Province of Ontario accounts for the largest percentage of revenue share in the Country at 50%, followed by an almost even split of 13-15% among British Columbia, Alberta, and Quebec.

COMPETITORS

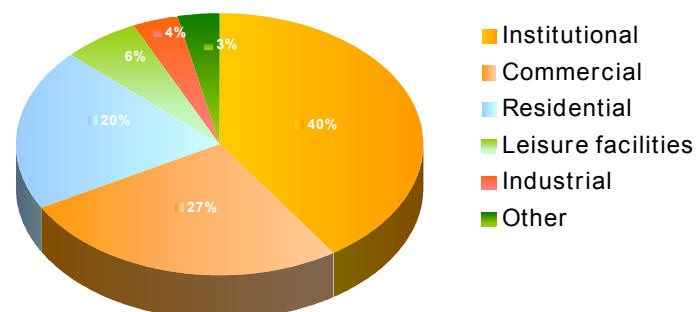
- ▶ More than 4,200 architectural establishments dominate the Canadian architectural market operating primarily on a local basis. Most of these have 1-3 employees and there are only 10-15 large firms with 50-100 employees. Ontario has the largest representation of Canadian architectural firms and is also home to the largest.

PRINCIPAL SUB-SECTORS

- ▶ Institutional (health care and educational facilities)
- ▶ Commercial (shopping malls and office buildings)
- ▶ Residential
- ▶ Leisure Facilities (athletic and cultural facilities)

Distribution of Full Service Income (by type of project)

Source: Statistics Canada



COMMERCIAL OPPORTUNITIES

- ▶ In 2001, the Canadian architectural industry experienced an overall increase of 8% from the previous year with operating revenues valued at \$1 billion (USD) in total. It is projected the Canadian architectural services industry will experience long-term growth, particularly in the design of retirement and long-term care facilities and the renovation and modification of existing buildings.

Project	Location	Current Construction Value (U.S.\$)	Status
Centre de sante universitaire Montreal	Montreal, QC	\$ 607,000,000	Contemplated
Light Rail Transit	Waterloo, ON	\$ 379,000,000	Contemplated
Vancouver Convention Center	Vancouver, B.C.	\$ 375,000,000	Planning
Casino de Montreal	Montreal, QC	\$ 357,000,000	Contemplated
Battery Park – Phases 2 & 3	Toronto, ON	\$ 332,000,000	Negotiated/planning
Vaughan Hills	Vaughan, ON	\$ 266,000,000	Under construction
William Osler Health Centre	Brampton, ON	\$ 266,000,000	Negotiated/planning
Union Station	Toronto, ON	\$ 228,000,000	Planning
Canadian Centre of Sport Excellence	Calgary, AB	\$ 197,000,000	Planning
Sault Area Hospital	Sault Ste. Marie, ON	\$ 179,000,000	Planning

THINK CANADA FIRST!

Architectural, Construction and Engineering services in Canada are essential contributors to Canada's economy. The industry currently represents 11% of Canada's GDP and is expected to show continued growth and increased profitability for the next five years. The Canadian government has committed more than US\$5 billion in infrastructure funding. In addition, the 2010 Winter Olympic Games will be hosted by Canada's most western province, British Columbia. Although the 2010 Games are still six years away, many of the infrastructure and Olympic facility projects are being initiated in the short to medium-term. Contact the U.S. Commercial Service in Canada and explore the export opportunities in this market today.

When you think of exporting, Think Canada First!

OTHER RESOURCES

- ▶ U.S. Department of Commerce ACE Team Leader, Raj Dheer: raj.dheer@mail.doc.gov
- ▶ A Practical Guide for Architectural, Construction and Engineering Service Companies Working in Canada. For a free copy, contact Rita Patlan, Trade Specialist at (416) 595-5412, ext. 223 or e-mail your request Rita.Patlan@mail.doc.gov.
- ▶ The Royal Architectural Institute of Canada: www.raic.org
- ▶ The Canadian Construction Association: www.cca-acc.com
- ▶ Construction Specifications Canada: www.csc-dcc.ca

We hope that you find this information useful. If you would like further information, please contact Rita.Patlan@mail.doc.gov, the CS Canada National Construction, Architecture and Engineering Services Sector Specialist. Visit our website www.BuyUSA.gov/Canada to discover other commercial opportunities in Canada. (July 2004)

CONTACT US

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